

New Volunteer Documentation Checklist

Below is a list of documentation recommended or required for every new Foster Grandparent and Senior Companion with a link to a resource when available. Most of the sample resources are from the appendices of the [Foster Grandparent](#) and [Senior Companion](#) handbooks located on the CNCS website. All resources referenced are samples. Please remember that it is the responsibility of each project to ensure that the the required information is collected, documented, and maintained in the project's files in compliance with Senior Corps rules and regulations.

Documentation	Description	Resource	Status
Original Application/Enrollment Form	Prospective volunteer fills out an application and the coordinator reviews and signs it. The coordinator must document that proof of identity has been checked and also verify driver's insurance coverage if providing mileage reimbursement.	Sample Foster Grandparent Application * Sample Senior Companion Application * *Note the age requirement in this sample is incorrect. The age requirement is 55, not 60. Sample Volunteer Enrollment and Insurance Form (FGP) Sample Volunteer Enrollment and Insurance Form (SCP)	<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.
Volunteer Authorization	The grantee and the applicant both sign and date the application to verify that the information is correct. The authorization should include name, address, telephone number, and date of birth of the applicant.		<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.
Original Proof of Income (update annually)	Complete this form with new volunteers and update it every year.	Sample FGP Annual Income Review Form * Sample SCP Annual Income Review Form * *Note the age requirement in this sample is incorrect. The age requirement is 55, not 60.	<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.

Documentation	Description	Resource	Status
(Designation of) Beneficiary Form & Update (update annually)	Projects should collect beneficiary information for each volunteer in case of accident and update it annually	Sample FGP Volunteer Update Form Sample SCP Volunteer Update Form	<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.
Volunteer Orientation Sign-In Sheet & Agenda	<p>New volunteers should receive 40 hours of orientation, of which 20 hours must be pre-service orientation, followed by an average of four hours per month of in-service training.</p> <p>Projects must document both pre-service orientation and in-service trainings and should keep the completed sign-in sheet and training agenda on file.</p>	<p>Foster Grandparent Program Handbook, Pre-Service Orientation section (Chapter 8)</p> <p>Senior Companion Program Handbook, Pre-Service Orientation section (Chapter 8)</p> <p>Optional in-service training resources are available on the website.¹</p>	<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.
Volunteer Handbook	This is information, given to volunteers at the point of application and during pre-service orientation, explains policies, rules, and regulations relevant to their assignments and to the FGP or SCP program.	As a best practice, projects often have volunteers sign off when receiving a Volunteer Policy Handbook to verify that the volunteer has received and read program policies.	<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.
Current Physical (required annually)	The volunteer is required to receive an annual physical by a health care provider. Documentation should establish that the volunteer is physically capable, with or without reasonable accommodation, of serving without injury to themselves or to the person served.	FGP Regulations, Subpart D SCP Regulations, Subpart D	<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.

• ¹ [Planning Annual FGP In-service Training: Models and Resources](#); [Supporting Children and Youth: Mentor Training for Senior Corps Volunteers](#); [Providing Independent Living Support: Training for Senior Corps Volunteers](#); [Using the Independent Living Curriculum and Planning Volunteer Training](#)

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Performance Evaluation (required annually)	The volunteer's performance is appraised annually with input from the service station. Performance should be discussed with the volunteer and documented.	The evaluation should be based on clearly stated expectations and should be conducted by the grantee. It may include input from the station supervisor.	<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.
Proof of Insurance (required annually)	See "Original Application" above. Proof of driver's insurance coverage must be updated annually.	Sample Volunteer Enrollment and Insurance Form (FGP) Sample Volunteer Enrollment and Insurance Form (SCP)	<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.
Volunteer Assignment Plan (required annually)	Complete a plan for every client served by the volunteer. Review with the volunteer and revise the plan as needed. Assignment plans must be completed annually.	Sample FGP Assignment Plan Sample SCP Assignment Plan	<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.
Letters of Agreement (if applicable)	Letters of Agreement may be embedded in assignment plans with their own signature line. Letters of Agreement are required if a volunteer will go into a person's home (e.g. Senior Companion visitors).	Sample FGP Letter of Agreement Sample SCP Letter of Agreement	<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.
Criminal History Checks: (1) National Sex Offender Search; (2) State Background Check; and (3) FBI Background Check.	All grantees must conduct National Service Criminal History checks on FGP and SCP volunteers. Begin running these checks at the date of enrollment and track your progress. Volunteers may not serve without accompaniment until either the state or FBI results are cleared. See NHCSC Checklist for documentation required.	Criminal History Check resources at the CNCS website including: <ul style="list-style-type: none"> National Service Criminal History Check (NHCSC) Documentation Checklist (DOCX) (PDF) Criminal History Assessment Tool (CHAT) for Senior Corps Projects NHCSC Checklist 	<input type="checkbox"/> We have these forms/know what to do. <input type="checkbox"/> We would like help.

Documentation	Description	Resource	Status
Proof of Accompaniment Timesheets	This is a log of the dates, times and person doing the accompaniment for each instance when an individual was in the presence of vulnerable populations before either an FBI Check or the State Checks clear. Accompaniment ends when either the State or FBI results are received.	Modify current timesheets to include the person (who has passed background checks) accompanying the volunteer. More on accompaniment can be found here: NHCSC Checklist .	<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.
Photo & Social Media Release Form (optional)	Sharing stories with funders or the media can help programs demonstrate their impact. If you plan to do this, ask volunteers who might be involved to sign a media release form. This is a recommended best practice.	Sample Release Form	<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.
Confidentiality Statement (optional)	Often programs ask volunteers sign a statement saying they understand that information they are privy to regarding the people they serve is confidential. This is a best practice.		<input type="checkbox"/> We have this form/know what to do. <input type="checkbox"/> We would like help.